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Welcome



STRATEGIC PLANNING That Actually Gets Implemented

FOR CHAMBERS OF COMMERCE



Do you currently have a strategic plan at your chamber?

| | | |
|----------|-----|-------------|
| Yes | No | Yes |
| Yes | Yes | Yes |
| No | No | Yes |
| No | Yes | Yes, we do. |
| Yes I do | No | Yes |

Do you currently have a strategic plan at your chamber?

Yes

No

Yes

Yes I do

Yes

OH YEAH!!!!!!

No

No

It's in development... still...

Yes

Yes we do

Yes

Yes

Kinda

Yes



Cindy Holzheimer, IOM, CAE



- NOACC President/CEO since 2018
- Former Executive Director with Beachwood Chamber
- Have been in the Chamber Industry for 12 years
- Graduated IOM and obtained CAE in 2022



To Get Started:

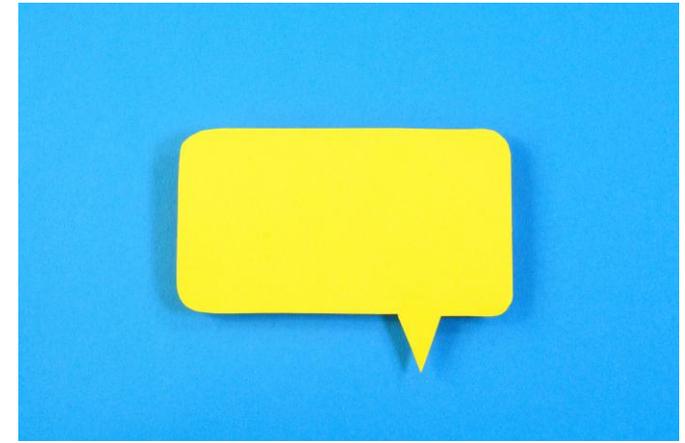
- **Set the stage:** Choose a date, location, and facilitator
- **Engage stakeholders:** Include board members, staff, and community leaders.
- **Review past plans and conduct assessments:** SWOT analysis, member surveys, and interviews.

Strategic Planning Session



Tell us about you... quick exercise

- Name
- Company you represent
- Why you joined the board
- What would your walk-out song be? or,
- What is a show/series you are watching right now?





Board / Staff Partnership

Understanding and respecting the distinct roles and responsibilities is key. (hierarchy)

Good communication is imperative.

Board to board, staff to staff, CEO to board chair

Board to Board

Staff to Staff

Board Chair to CEO



Govern More - Manage Less!

**BOARD GOVERNS
STAFF MANAGES**



As a board member, your greatest legal responsibility is to make decisions that benefit the chamber and its mission. You must put your organization's interests above your own.

HEIRARCHY OF GOVERNING DOCUMENTS



The Governing Documents - Read to Lead

- ✓ Articles of Incorporation – purpose for existence/relationship to state government
- ✓ Chamber Bylaws – Relationship to members
- ✓ Policies and Procedures – interpretation of the governing documents
- ✓ Strategic Plan – roadmap for the organization
- ✓ Annual Budget – financial position



What is a Strategic Plan?



- Strategic planning is an organization's process of defining its strategy or direction and making decisions on allocating its resources to pursue this strategy.
- The strategic plan is a living, breathing document or road map that guides the organization.
- **Board** – responsible for setting the direction of the organization through goal setting and management of the strategic plan as a fiduciary responsibility.
- **Committees and Staff** are responsible for implementing the organizational details of the strategic plan



Why Strategic Planning is Essential

- Achieve the chamber mission and vision
- To solve problems and assess opportunities in the industry
- Is a great reality check, who are we and where are we going?
- You have the chance to act as visionaries, future thinking
- Will help guide decisions, create a budget and measure success for the organization.



Strat Plan Process

- Set 3-5 Main Pillars
- Set Goals or Action Steps for each pillar
- Determine the who/what/when for the Goals
- Plan Write-up/ Plan Vote
- Promote the plan to members
- Evaluate and Report on the plan's progress



What should the plan include?

Mission
Vision
Values

Pillars/ Goals
Strategies

BHAG

ASSOCIATION FOR STRATEGIC PLANNING STRATEGIC PLAN 2020 – 2022



Vision

Be the global standard bearer for organizational transformation and success through strategy.



Mission

Lead and support people and organizations through the promotion of a holistic approach to strategy management and by setting standards for strategy through thought leadership, professional development and certification.

Pillars

Mission Driven Pillars

Thought Leadership 1



Create and curate relevant theory and practice, introduce high-level and innovative strategic thinking and approaches, and create of new knowledge and high-impact tools.

Professional Development 2



Deepen ASP's content offerings, expanding the value ASP brings to members, and continuing to use this information as an opportunity to connect with potential members and leaders in the strategy field.

Member Experience 3



Offer worldwide and local networks to enhance experience where people share experiential knowledge and ideas in strategy.

Certification 4



Establish a high-level of quality and consistency within the fields of strategic planning and management so that strategic planners and those responsible for developing and deploying strategy can assist organizations in meeting and exceeding the challenges of the 21st century.

Foundational Pillar

Foundation 5



Financial Sustainability/Operational Excellence/People: Deliver value and impact for our members through operational efficiency, transparency and stewardship.

Further details available here:
www.strategyassociation.org/ASPstrategicplan_Details

The NOACC Focus



MISSION

Elevating Chambers and Chamber Professionals Through Dynamic Benefits and Resources

VISION

To become the go-to resource for chambers and chamber professionals in Northern Ohio for all things chamber of commerce.

Core Values

Generosity
Humility
Integrity

STRENGTHS

- Membership growth
- Events well attended
- Engaged Executive Director
- Strength in targeted networking
- Providing networking opportunities
- Consistent communication with members
- Great partners with City and Schools
- Consistent membership numbers
- Engaged executive committee
- Cost-saving program growth
- Active sub-committees

WEAKNESSES

- Outdated governance - documentation/processes
- No clear strategic direction
- Lack of large business participation
- Leadership changes in the last 3 years
- Voice of membership needs refreshed
- Lack of board participation
- Need stronger committees
- Membership engagement
- Low event participation
- Small chamber staff
- Reduced board size

SWOT Analysis

OPPORTUNITIES

- Membership growth
- Marketing the chamber
- Alliances with other chambers
- Membership return on investment
- Grow speaker base - maybe include members
- Increase non-dues revenue opportunities
- Unique offering for company leaders
- Smaller - focused groups
- Member engagement

THREATS

- Post COVID mentality
- Neighboring chambers
- Membership sustainability
- Other non-profits vying for dollars
- Competition from other networking groups
- Lack of interest from business community
- Changes in the business environment
- Perceived value (or lack thereof)
- Company budgets



Choosing Pillars

EXERCISE

Common Chamber Strategic Pillars

Marketing

Events

Membership

Advocacy

Partnerships

Social Media

Member Benefits

Communication

Thrive Financially

Board of Directors

Non-Dues Revenue

Professional Development

Organizational Development

Strategic Pillars (Main Areas of Focus)

3-5 Possible Pillars



Membership Engagement & Programming



Membership Growth & Retention



Staff & Board Development/Succession



Strategic Partnerships



Marketing & Communications



GOAL/Action Step setting

EXERCISE

Setting the goals/action steps

ABC Strategic Plan Worksheet | Status of each item should be addressed at each board meeting

Our Mission: Stengthen the community and support economic vitality

Our Focus: Bring awareness to the chamber and our resources

Pillars

5 YEAR GOALS

Grow Membershp by ___%

Grow sponsorship revenue by ___%

Goals / Action Steps

| Goals / Action Steps | Deadline | Responsible | Lead | Status | Notes |
|--|----------|-------------|------|--------|-------|
| Expand partnerships with other chambers | | | | | |
| Focus partnerships with other charities | | | | | |
| Look into creating a YP group with neighboring chambers | | | | | |
| Research area organizations for possible speakers | | | | | |
| Research a quarterly luncheon with other chamber leaders | | | | | |
| Consider partnering with a Community Foundation | | | | | |

Goals/Action Steps

Advance Professional & Organizational Development

| Goals / Action Steps | Deadline | Responsible | Lead | Status | Notes |
|--|----------|-------------|------|--------|-------|
| Find ways to recruit, retain and engage committee members | | | | | |
| Making sure enough staff to handle the day-to-day operations | | | | | |
| Building in staff development into calendar and budget | | | | | |
| Evaluate all current committee structures | | | | | |
| Building in board development into board meeting agendas | | | | | |
| Evaluate/Revise criteria for board service | | | | | |
| How to best use volunteer time/talent/treasure | | | | | |

ABC Strategic Plan Worksheet | Status of each item should be addressed at each board meeting

Our Mission: Stengthen the community and support economic vitality

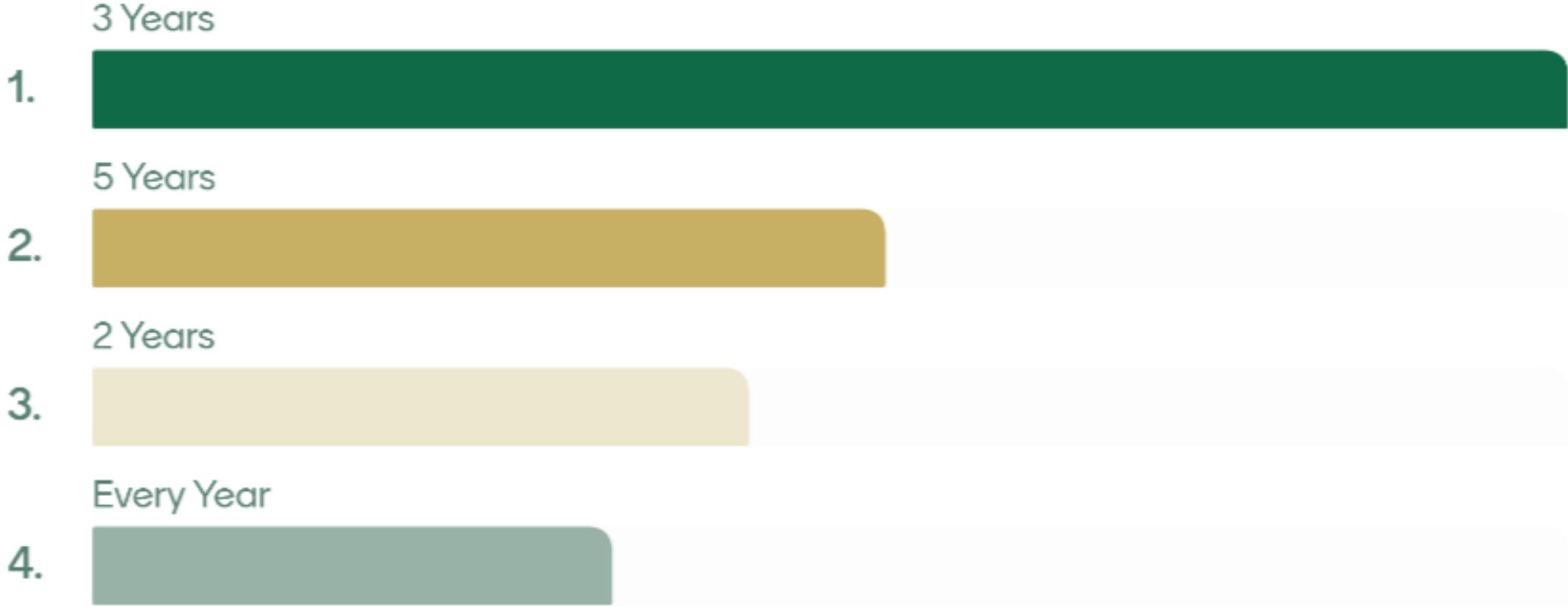
Our Focus: Bring awareness to the chamber and our resources

| Strategic Partnerships | | | | | |
|--|-----------------|--------------------|-----------------|---------------|---|
| Goals / Action Steps | Deadline | Responsible | Lead | Status | Notes |
| Expand partnerships with other chambers | Qtr 1 | Committee | President/Board | Done | |
| Focus partnerships with other charities | May 1st | Committee | President/Board | Done | |
| Look into creating a YP group with neighboring chambers | Qtr 2 | Committee | President/Board | Ongoing | |
| Research area organizations for possible speakers | June 1st | Committee | President/Board | Ongoing | |
| Research a quarterly luncheon with other chamber leaders | Qtr 3 | Committee | President/Board | Ongoing | to share, collaborate and make peer connections |
| Consider partnering with a Community Foundation | Qtr 1 | Committee | President/Board | Ongoing | for possible scholarships |

| Advance Professional & Organizational Development | | | | | |
|--|-----------------|--------------------|---------------|---------------|--------------|
| Goals / Action Steps | Deadline | Responsible | Lead | Status | Notes |
| Find ways to recruit, retain and engage committee members | Qtr 3 | Comm. Chair | President/CEO | Done | |
| Making sure enough staff to handle the day-to-day operations | Qtr 3 | Board | President/CEO | Done | |
| Building in staff development into calendar and budget | Qtr 2 | Board | President/CEO | Ongoing | |
| Evaluate all current committee structures | Qtr 1 | Comm. Chair | President/CEO | On Hold | |
| Building in board development into board meeting agendas | Qtr 2 | Board | Board Chair | Done | |
| Evaluate/Revise criteria for board service | Qtr 3 | Board | Board Chair | Done | |
| How to best use volunteer time/talent/treasure | Qtr 4 | Board | President/CEO | Done | |

| Foster Membership Growth & Engagement | | | | | |
|--|-----------------|--------------------|-----------------|-------------------|--------------|
| Goals / Action Steps | Deadline | Responsible | Lead | Status | Notes |
| Create a mentorship program for new members | Qtr 1 | Committee | President/Board | Done | |
| Create a drip email campaign to new members | Qtr 2 | Committee | President/Board | Done | |
| Survey previous members, why did they leave? Ask to return | Qtr 1 | Committee | President/Board | Done | |
| Create a program to reach non-member businesses | Qtr 1 | Committee | President/Board | Ongoing | |
| Create a member onboarding process/touchpoint schedule | Jan. 31 | Committee | President/Board | Done | |
| Develop an existing member retention reach-out program (frequency, communication method, etc.) | Qtr 2 | Committee | President/Board | Move to Next Year | |
| Determine member needs (interviews, surveys, etc.) | Qtr 3 | Committee | President/Board | Done | |
| Review membership application, are there boxes to check for interest in cost-savings, events, advocacy, etc. | Qtr 4 | Committee | President/Board | Ongoing | |

How often do you do a new strategic plan?





What
happens
next?

Strategic Plan Marketing

NOACC Strategic Pillars

Expand Non-Dues Revenue

Expand membership of affinity programs and other non-dues revenue opportunities



Advance Professional & Organizational Development

Build on access to strategic planning and board development



Foster Membership Growth & Engagement

Engage members in NOACC programs and services



Enhance Marketing & Communication

Increase brand awareness and communication to members



Thrive Financially

Create education programs for financial health for members



PRINT

Business Card
Brochure
Placemat



BANNERS

Pop-up Banners
Tabletop Banners
Wall Art



ONLINE

Post on website
Make a social post for each of the objectives



MEETINGS

Dashboard
On Committee
Agendas
At Board Meetings



Strategic Plan

Vision

Develop world-class leaders in science and engineering to benefit society.

Mission

Educate
scientists and engineers to address global challenges.

Innovate
to reach our creative potential.

Engage
in partnerships to transform society.

Goals

Academic & Co-Curricular Excellence
Graduate innovative students to solve global challenges.

Research & Innovation
Discover knowledge and create partnerships that benefit society.

Outreach & Engagement
Build recognition and respect by promoting our achievements and increasing engagement.

Campus Culture
Create an inclusive and thriving campus environment.

INTEGRITY INGENUITY Values INCLUSION IMPACT

Aligning
for Growth

United
in Learning

Together
Towards Equity

Building
a New Legacy





Evaluate



- Appoint a point-person(s) to keep track of what is being accomplished and not to keep everyone on track. (usually board chair and ED/CEO.)
- **EVALUATE** how things are going, **REGULARLY**, and make course corrections where needed.
- Take the time to evaluate at **EVERY** board meeting to ensure the plan is on track.



Questions



Contact us



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